

NGA Regional Market Trends 2022

Winter Look Back

March 29, 2022

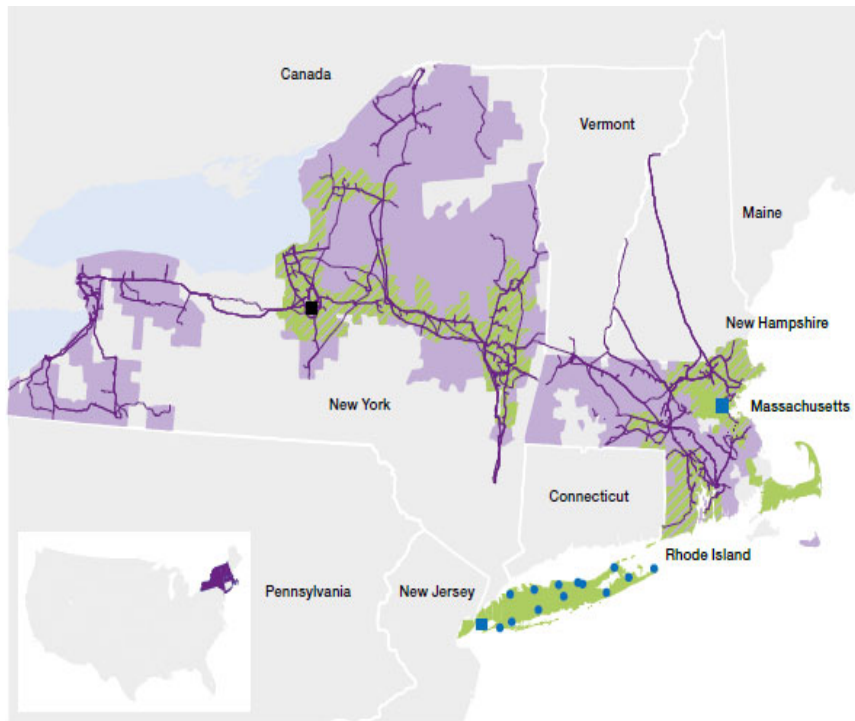
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nationalgrid



National Grid

National Grid is one of the world's largest investor-owned utilities, with more than 7 million gas and electric U.S. customers and 22,000 employees in the U.S. and U.K.



Our commitment to customers and the future of energy

National Grid U.S. by the numbers

- 3.6 million gas customers
- Gas network of 35,000 miles of gas distribution pipeline; 490 miles of gas transmission pipeline
- 3.4 million electric customers
- Electricity transmission network of 8,800 miles of overhead line; 100 miles of underground cable; 380 transmission substations

Winter 21-22 Weather

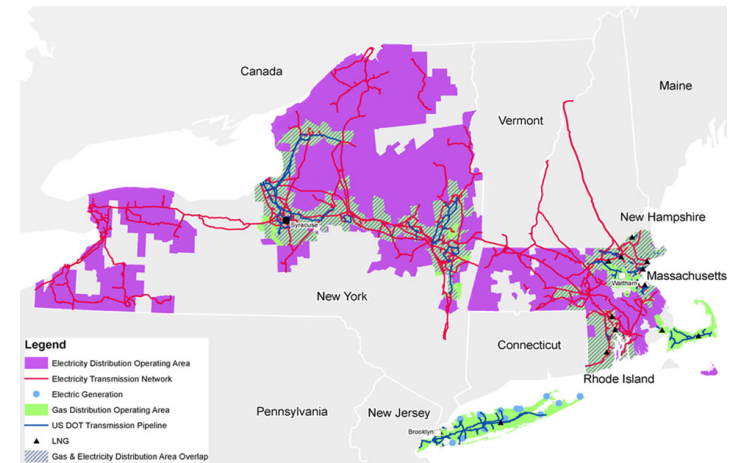
- Winter Slightly Warmer than normal
- Dec- March to date comparison for NY Companies has NY Downstate Area 4.6% warmer than historical average and Upstate 2.9% Warmer. MA and RI were 3.0% and 3.1% warmer, respectively.
- Driven by warmer than average December, February and March
- January was colder than average NY Downstate (+12%) NY Upstate (+10%) MA (+11%) RI (+12%)
- Several combined gas day periods of large swings from warmer than average days back to average or below average colder gas days made for challenging operations



- 21-22 – What was the outlook?

National Grid Winter Operations

- Company wide top 10 for throughput (includes power generation) set in Mid January
- Operating Companies set Top 10 Records in 3 of the 5 Operating Companies
- LI and UNY set records in Mid January for Sendout (excludes power generation)
- NYC, our KEDNY Operating Company set a top 10 Throughput in early February
- No top 10 days in MA or RI this winter
- Covid Impacted NY Control Center Operations with the omicron spike in late December and early January leading to an early rise in illness/quarantine impacts. NE Control Center did not see the similar spike.



National Grid Winter Operations

- Called on Non-Firm Customers to interrupt supply on coldest of days- Each operating Company has different rules resulting in different time/duration of events
 - NYC- Tier 1 (15 degrees) - 4 periods Tier 2 (20 degrees) – 8 periods
 - LI- Tier 1 (15 degree) – 5 periods Tier 2 (20 degrees) – 9 periods
 - UNY- 5 periods
 - MA- 4 days
 - RI-16 days
- Operating Companies issued OFO's as needed throughout winter to maintain reliable service - average to lower than average use of balancing and 1/24th OFO's were issued this winter
- Company called on LNG assets during peak conditions for supply- Usage was slightly below average for NE LNG Plants and similar profile for DNY plants.
- LNG assets were called on for pressure support during periods of Upstream events (compressor outages, etc.).

4 CNG Transfer Sites delivered in two years to support peak hour demand during the coldest days of the winter

Riverhead
CNG



Site Details:

- Peak Flow Rate: 1,100 dt/hr
- Site Capacity: 12 Trailers
- Commissioned in Feb 2020

Inwood
CNG



Site Details:

- Peak Flow Rate: 2,200 dt/hr
- Site Capacity: 24 Trailers
- Commissioned in Dec 2020

Glenwood
CNG



Site Details:

- Peak Flow Rate: 2,200 dt/hr
- Site Capacity: 22 Trailers
- Commissioned in Dec 2020

Barrett
CNG



Site Details:

- Peak Flow Rate: 2,200 dt/hr
- Site Capacity: 24 Trailers
- Commissioned in June 2021